

Trust in innovation: Between familiarity and fear

Part three of the EIT Food Consumer
Observatory Trust Report Series 2026

August 2026



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Trust as the foundation for change

Achieving a healthier and more sustainable European diet requires more than good intentions and innovative products - it requires trust. Consumers will be more likely to adopt ground-breaking innovations and believe the information provided about them, if they trust the people and institutions behind the food system. If they can trust that producers act with integrity, that technologies are safe and that information is transparent and evidence-based. As Europe moves towards dietary transformation, trust remains the essential ingredient that connects innovation, communication and consumer acceptance - and ultimately determines whether healthier and more sustainable eating can become the norm.

Food innovations will only be embraced by consumers if they believe that these innovations are safe and actually good for them as well as the planet.

Over the past eight years,* the EIT Food Consumer Observatory has tracked the trust Europeans have within the food system - and how this trust influences what they eat, how they make food choice and how open they are to innovation.

The 2026 edition marks an important new step: instead of one comprehensive Trust Report, the findings are now presented across four focused reports. This change reflects the growing depth and diversity of the data, as well as our ambition to make insights more relevant and actionable for different audiences - from policymakers to food companies and researchers. Together, these four reports provide a complete picture of how trust, knowledge and behaviour interact to shape the future of Europe's food system.

The framework on the following page summarises all the elements related to trust in the food system and how they interact to shape food choices.

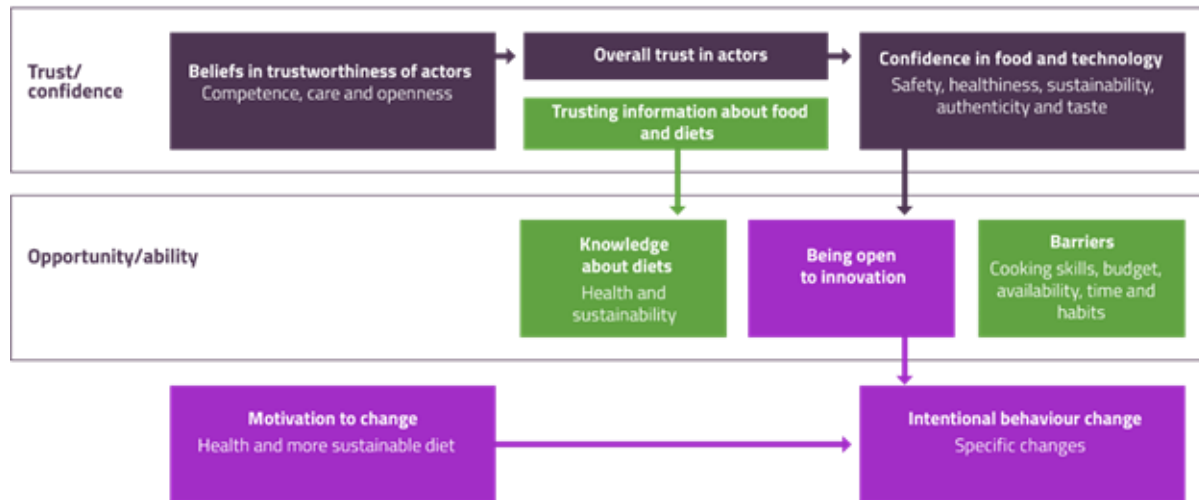
This report combines the past eight years of insights on trust through in depth-qualitative and quantitative research in the EIT Food TrustTracker® study.

- Consumers were surveyed across 18 European countries (Belgium, Czechia, Denmark, Finland, France, Germany, Greece, Ireland, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, Israel and the UK).
- Fieldwork for this year's study was conducted in July and August 2025. 19,954 European consumers over 18 years old, and nationally representative in terms of age and gender, participated in the study.
- The TrustTracker® study has run every year since 2018.
- Since 2018, around 140,000 consumers have been surveyed.
- The TrustTracker® was originally developed by EIT Food partners University of Reading (project lead), the European Food Information Council (EUFIC), Aarhus University, KU Leuven and the University of Warsaw.

**Some of the elements of the study have only been included in the 2024 edition, so we have no data from before that year.*

What is part of the TrustTracker® Framework?

The model below summarises the theoretical framework that forms the foundation of EIT Food's TrustTracker®. The four aforementioned 2026 Trust Reports all highlight one or more elements of this framework.



Report 1: What Europeans eat and what they want to change

A deep dive into Europeans' diets, intentions and barriers to change – highlighting trends in health, affordability and sustainability.

Report 2: The state of trust in the food system

An overview of how trust is evolving across actors in the food chain – from farmers to authorities – and what drives or erodes this trust.

Report 3: Trust in innovation: Between familiarity and fear

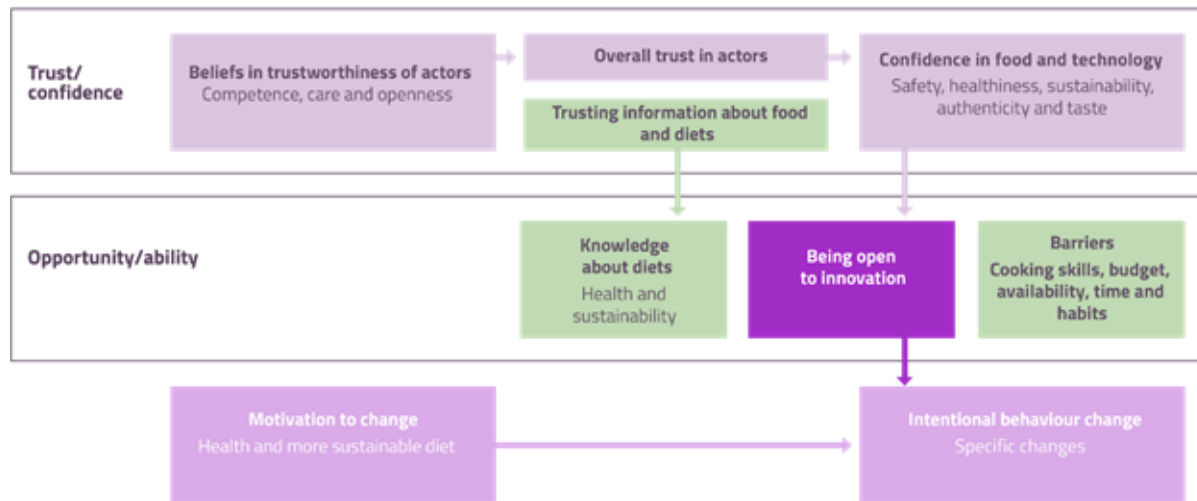
Insights into consumer openness toward new food technologies – from personalised nutrition to cultivated meat – and the cultural factors behind acceptance.

Report 4: Who do consumers believe?

Analysis of food literacy, trusted information sources and transparency expectations shaping consumer decision-making.

What is this report about?

This report explores the openness towards innovations. How willing are Europeans to accept new technologies to produce food? And what influences this acceptance?



Report 3: Trust in innovation: Between familiarity and fear

Insights into consumer openness toward new food technologies – from personalised nutrition to cultivated meat – and the cultural factors behind acceptance.

Trust in innovation: Between familiarity and fear

What to expect in this report

- **Trust in food innovation is a critical factor shaping Europe's transition toward healthier and more sustainable diets.** As consumers are increasingly confronted with new technologies – from precision fermentation to cultivated meat – their openness depends strongly on whether they trust the actors who develop, regulate, sell and communicate these innovations. Innovation acceptance is therefore not simply a matter of product benefits, but of the credibility, transparency and integrity perceived across the whole food chain.
- **EIT Food's Consumer Observatory has monitored openness to innovation since 2018.** The 2026 results show a cautiously rising appetite for trying new products, particularly among younger consumers, but also a decline in willingness to try several specific technologies introduced in previous years (or in the upcoming years). This tension reflects a broader dynamic: innovation curiosity is increasing, yet technological unfamiliarity, cultural norms and emotional reactions continue to hold many consumers back.
- **This report explores how familiarity, trust, age, values and cultural narratives shape consumer responses to food innovation.** It identifies which innovations are gaining traction, where resistance is growing, and how trust in the food system conditions consumers' willingness to adopt new technologies. Together with insights from the other three 2026 TrustTracker® reports, it provides a detailed understanding of how trust and innovation interact in shaping the future of Europe's food system.

KEY TAKEAWAYS

Trust in innovation: Between familiarity and fear

Key takeaways

- **Openness to innovative new food products is increasing but remains low.**
Overall openness grew slightly from 28% to 31% in 2025, suggesting a gradual shift away from scepticism. Despite this improvement, fewer than one-third of Europeans say they are open to trying unfamiliar food innovations.
- **Younger Europeans are consistently more open to innovation.**
Nearly two in five consumers aged 18–34 indicate openness to new products, compared with fewer than one in five among the 55+ group. Age remains one of the strongest differentiators in innovation acceptance.
- **Trust in the food system strongly predicts willingness to try new technologies.**
Among those who trust the food system, 38% are open to innovation, versus just 6% among those with low trust. Trust acts as a gateway: without it, innovation acceptance remains extremely limited.
- **Willingness to try specific technologies fell from 2024 to 2025 - even as general openness increased.**
Consumers became more hesitant toward several new technologies, especially insects, precision-fermented dairy and cultivated meat. The more radical or unfamiliar the technology, the lower the likelihood of trial.
- **Consumers who are health and sustainability oriented are more open to innovation, but only when trust is high enough.**
Health-focused consumers who trust the food system are far more likely to be willing to adopt new food technologies (32%) than health-focused consumers with low trust (8%). A similar pattern appears among sustainability-oriented consumers, where willingness is 35% among high-trust consumers versus 10% among low-trust consumers. This shows that trust is a key condition for health- and sustainability-driven adoption.

Trust in innovation: Between familiarity and fear

Recommendations

Overall recommendation

- Innovation acceptance in Europe is rising, but fragile. Trust in the food system is a prerequisite - not a bonus - for consumers to adopt new technologies.
- Strengthening credibility, cultural resonance and transparent communication is essential for translating innovation potential into real-world dietary impact.

For policymakers

- Clear oversight, visible enforcement of safety regulations and early communication reduce uncertainty, especially among older and more risk-averse citizens.
- Create enabling conditions for responsible innovation ecosystems.
- Public engagement, safety assurance and evidence-based regulation increase legitimacy and confidence in new food technologies.

For innovators, manufacturers, and food brands

- Humanise the innovation story.
- Consumers respond more positively to science when it is connected to people, values and purpose. Abstract or highly technical narratives reinforce scepticism.
- Emphasise taste, health and pleasure.
- Ethics and sustainability matter, but mainstream acceptance requires demonstrating flavour, nutrition and everyday relevance.

For communicators, including NGOs and civil society

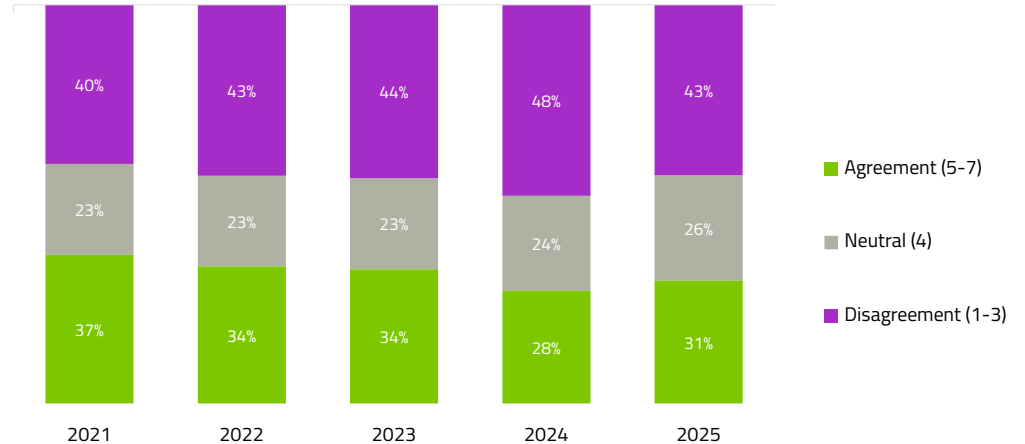
- Make unfamiliar technologies culturally relatable.
- Narratives connecting innovation to community, quality, craftsmanship or ethics help close the gap between familiarity and fear.
- Lead with balanced, evidence-backed transparency.
- Clear information about safety, nutritional value and environmental impacts helps counter emotional resistance and builds confidence.

FINDINGS

Openness to innovative new products increases, but remains low

- Levels of openness in 2025 have slightly recovered from the all time low in 2024, increasing from 28% to 31%.
- This careful increase may indicate a movement away from distrust in science and food manufacturing, as indicated by an increase in trust in the food system.

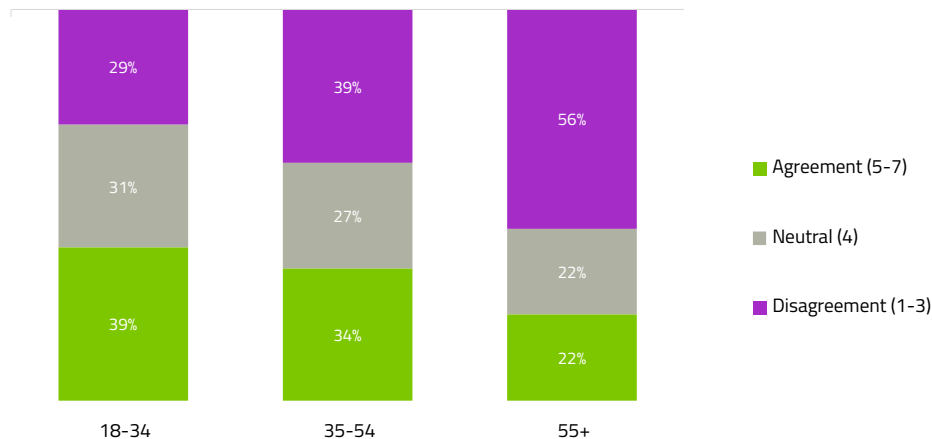
Openness to innovation



Younger consumers (18–34) remain the most open to innovations in 2025

- The 55+ age group is the most reserved towards innovation in food. Over half of this group is not open to new food products.
- Younger consumers (18–34) remain the most open to innovations in 2025, with nearly two in five claiming to be open to innovations (versus just under one in five among older 55+ consumers).

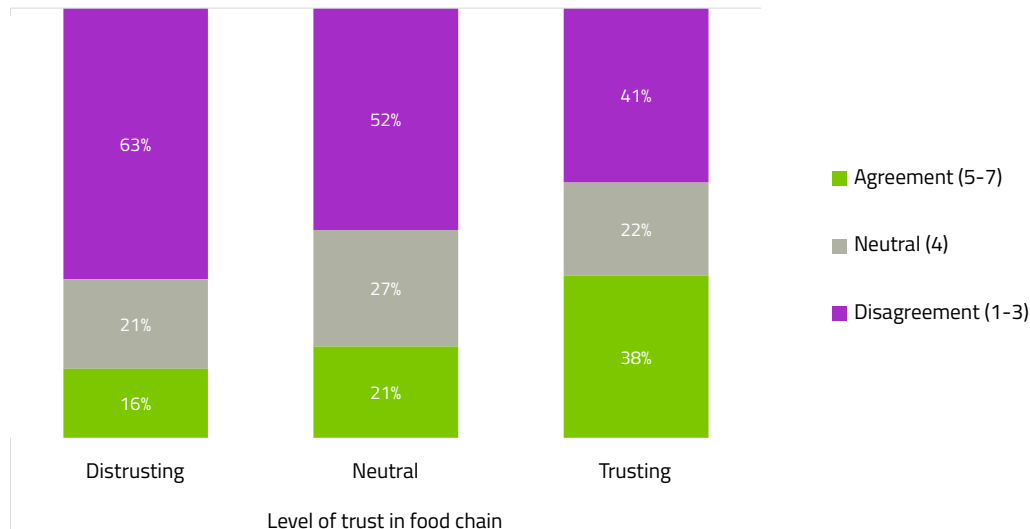
Openness to innovation (2025)



Trust in the food chain is clearly linked to being open to innovation

- Those Europeans who display trust in the food system, are much more likely to adopt innovation. Of those who have trust, 38% are open to innovation, compared to only 6% of those who have a lack of trust.

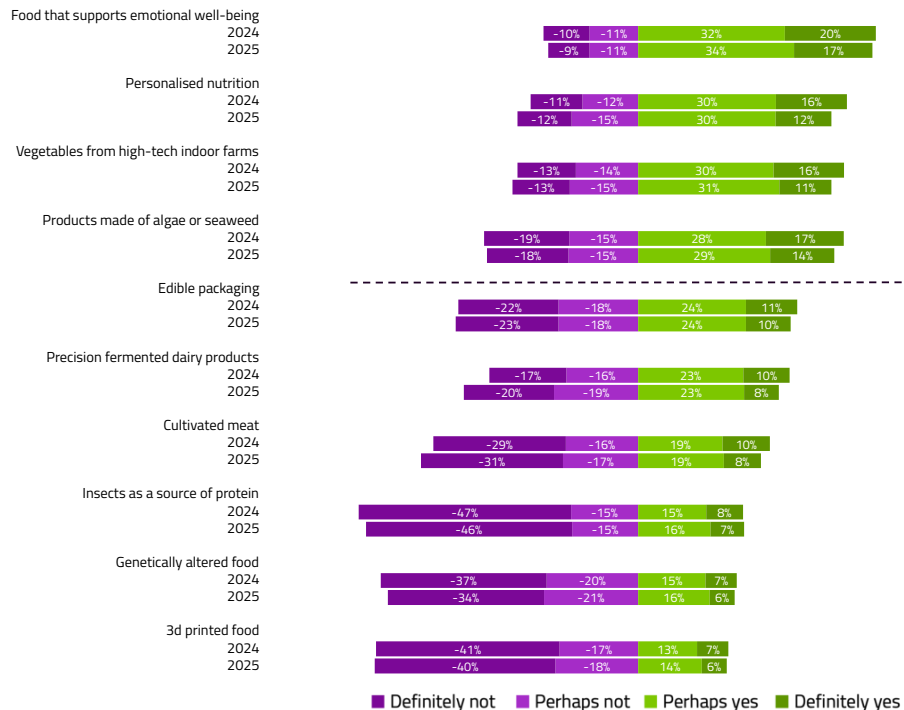
Relationship between trust in the food chain and openness to innovation



Willingness to try most new technologies fell from 2024 to 2025, despite the increase in openness to try new products in general

- The more radical the food technology, the less likely consumers are willing to adopt it. Radical technologies may clash with consumers' cultural, personal or religious values. And despite an increase in trust in the food system and an increase in (claimed) openness to innovation, consumers seem to be less open to completely new types of food or ingredients.
- For example, insects as a source of protein are likely to trigger feelings of disgust among consumers who are unfamiliar with this food. Over three out of five consumers would not adopt insect protein in their diet.
- Consumers have become less willing to try precision fermented dairy and cultivated meat products with disapproval in the population growing from 33 to 39% and 45 to 48% respectively.
- Approval rates of less radical technologies (above the dotted line) each fell 3-5% from 2024 to 2025.

Willingness to try new technologies



Discovering the cultural meaning of meat

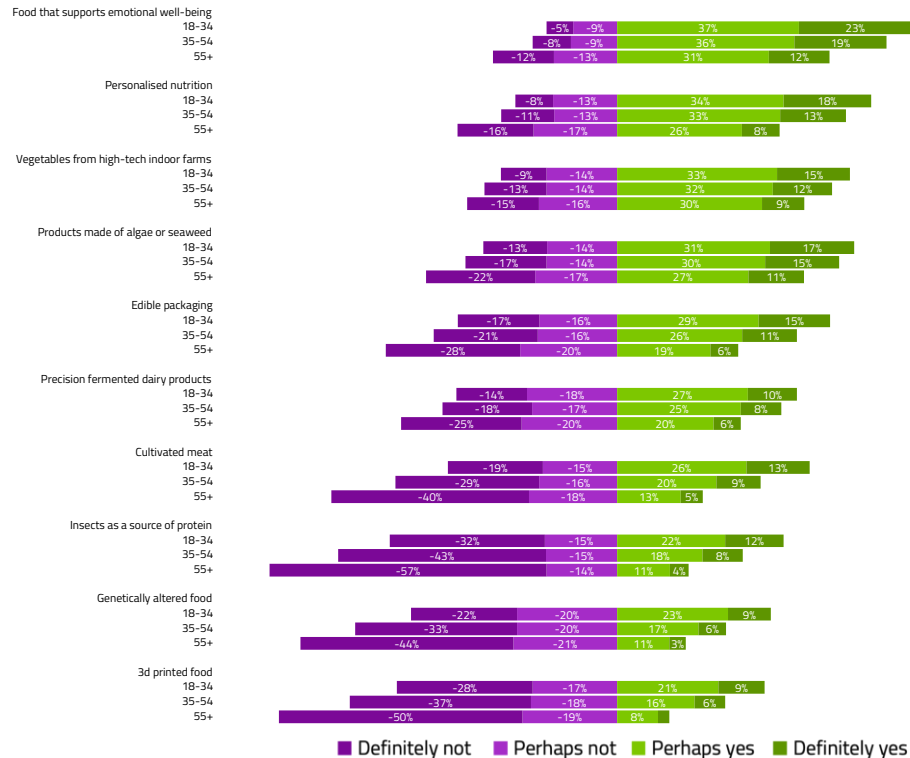
In 2025 the EIT Food Consumer Observatory published [More Than Meat](#), a study exploring the cultural narratives around meat in Europe and how alternatives to traditional meat can be presented in a culturally resonant manner.

- There are four cultural narratives determining how we see meat:
 - Utility: meat as a resource to be exploited for human benefit.
 - Symbiosis: meat as part of a harmonious system with nature and society.
 - Human nature: instinctual, primal drivers for consuming meat.
 - Human ingenuity: innovation and technology reshaping food systems.
- The study found that cultural perceptions are shifting - a prelude to a shifting landscape. While conventional meat still dominates habits, concerns about animal welfare, health and sustainability have led to meat moving from commoditised and utilitarian to more mindful, symbiotic narratives.
- The current narrative around cultivated meat is focused on science, innovation and guilt-free indulgence, which places it dangerously close to the cultural territory of commoditised meat – a norm culture is shifting away from.
- Consumers are curious but sceptical of cultivated meat. While they appreciate the ethical and environmental benefits of cultivated meat, concerns about taste, health and authenticity remain.
- For cultivated meat to thrive, the industry must tap into existing positive narratives, like community, ethics and celebration, while steering away from industrial, artificial imagery. The findings recommend that cultivated meat marketers:
 - Tell the story of 'mindful science': a tech-heavy narrative alienates mainstream consumers who value emotional connection. To humanise the innovation, show real people behind the science, their values, and the 'why' behind their work.
 - Reclaim 'real meat': consumers question if cultivated meat is 'real' or 'natural'. To counter this, state: this is real meat just made differently.
 - Anchor products in taste, health and feel-good eating: cultivated meat brands focus heavily on ethics and sustainability but underemphasise satisfaction and health. By communicating flavour and nutrition, cultivated meat can become a smart, indulgent choice, not just an ethical one.
 - Start with 'soft science' and grow into humane innovation: in the short-term, use the 'soft science' approach to build trust. Long-term, pivot to emotional and ethical narratives without needing to focus on the tech at all.

Consistent with a higher openness to innovation in general, younger consumers are more willing to try food made by new technologies

- The more radical the innovation, the bigger the difference in willingness to try it between younger and older consumers. Looking at cultivated meat for instance, 39% of consumers under 35 are willing to try it, versus 18% of 55+.
- The difference is consistent for all tested new technologies.

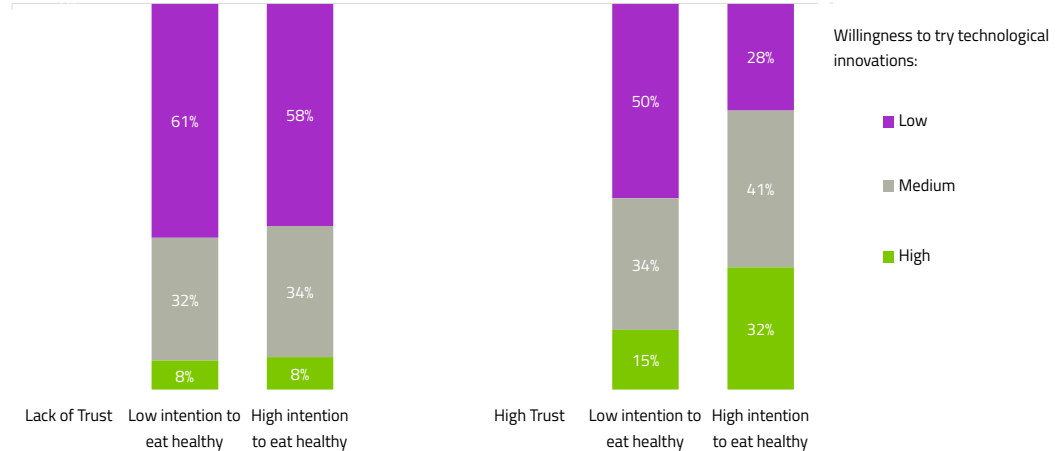
Willingness to try new technologies by age



Trust in the food system is a condition for the willingness to accept new technologies, particularly for those looking for a **healthy** diet

- Consumers that find it important to eat a healthy diet have a much higher willingness to try products from new technologies.
- But this effect is much stronger for those who display a high level of trust in the food system.
- Among Europeans who have a strong intention to eat a healthy diet but low trust in the food system, only 8% are willing to try the new technologies presented to them. This percentage increase to 32% if there is a sufficient level of trust.
- This indicates that many see these new technologies as a potential way to eat more healthily, but this will only materialise in acceptance of new products if there is a sufficient level of trust in the food system in general.

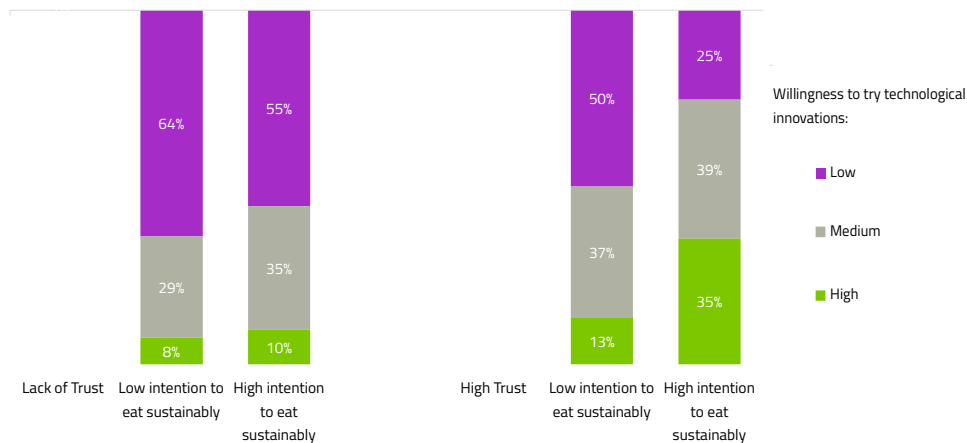
The mitigating effect of trust on intentions to eat a healthy diet and accept new technologies



Trust in the food system is a condition for the willingness to accept new technologies, particularly for those looking for a **sustainable** diet

- Consumers that find it important to eat a sustainable diet, have a much higher willingness to try products from new technologies.
- But this effect is much stronger for those who display a high level of trust in the food system.
- On average, among Europeans that have a high intention to eat a sustainable diet but a lack of trust in the food system, 10% are willing to try the new technologies we showed them. This percentage increase to 35% if there is a sufficient level of trust.
- This indicates that many see these new technologies as a potential way to eat more healthily, but this will only materialise in acceptance of new products if there is a sufficient level of trust in the food system in general.
- The effect of (lack of) trust among health-conscious consumers and sustainability conscious consumers is similar in size.
- The difference in willingness to try products from new technologies between health-conscious consumers and non-health-conscious consumers is smaller than between sustainability conscious consumers and non-sustainability conscious consumers. This indicates that a desire to eat a more sustainable diet is a stronger motivator for adopting these new technologies than health.

The mitigating effect of trust on intentions to eat a sustainable diet and accept new technologies



About the EIT Food Consumer Observatory

Powered by EIT Food, the Consumer Observatory brings together experts and consumer insight organisations from across the food system to curate and produce consumer insights, trend analysis and research tools.

By combining research expertise, sector knowledge and the green transition behaviour change perspective, the Consumer Observatory aims to maximise the availability of consumer insights on agrifood topics, delivering greater knowledge, strategy and guidance to agrifood stakeholders – helping to bring about positive change in the food system.

This platform puts consumer knowledge and behaviour at the heart of the conversation on food sector trends, driving forward innovative solutions that will help to achieve EIT Food's three missions:

- A Net Zero Food System
- Healthier Lives Through Food
- Reducing Risk for a Fair and Resilient Food System

To access the latest insights or to discuss your specific insight needs, visit eitfood.eu/projects/consumerobservatory

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Thank you